

Enlisted Individual Development Plan (IDP) User Guide

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Introduction

The Individual Development Plan is a valuable performance enhancement and career development tool. The following information is designed to acquaint you with the process, purpose, goals, steps, and value of an IDP.

The supervisor and the member are to work together on the IDP. A convenient time for the supervisor to have a counseling session with the member is:

- First-termers: Required within 30 days of reporting to the unit and then every six months.
- All other enlisted personnel: Within 30 days upon entry in a new job and then every six months.

Remember, the IDP is not a performance evaluation tool.

Definition of an IDP

An IDP is a tool to help individuals reach career goals within the context of organizational objectives. It is a developmental "action" plan to move the individual from where they are to where they want to go. It provides the systematic steps to build on strengths and overcome weaknesses as individuals improve job performance and pursue career goals. It is a tool for all personnel regardless of status or performance.

The most common objectives for having an IDP are to:

- Learn new skills to improve current job performance.
- Maximize current performance in support of organizational requirements.
- Increase interest, challenges, and satisfaction in current position.
- Obtain competencies necessary for a promotion or change in specialty.

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An IDP is...

An IDP is:

- A developmental partnership between the individual and supervisor. IDP preparation involves feedback, clarification, and discussion about developmental needs, goals, and plans. Supervisor-subordinate communication is key to the success of the IDP process.
- A vehicle to address the needs of the individual and the needs of the organization. The best IDPs begin with a plan to maximize current job performance. The activities can assist the individual in meeting both personal and organizational goals for success.
- A tool to identify a member's developmental needs based on a comparison of skills required by a job and present abilities. It identifies specific competencies for which the person requires development. The mutual interests and concerns of the individual and the organization must be considered in the IDP process.
- A tool to facilitate a relationship between a mentor and a mentee.
- A broadly defined developmental plan that includes on-the-job assignments, self-development activities, and formal classroom training.
- An active and ongoing process. An IDP is a living process that encourages individual empowerment and growth. Ideally, IDPs should be reviewed, updated, and changed as needed every six months.

An IDP is not...

An IDP is not:

- A one-time activity.
- A performance appraisal. The IDP should not be used as a means to formally assess the member's performance and should not be used for human resources decisions (e.g., promotions, etc.). It does not replace the performance evaluation form/system to determine advancements, promotion, pay, awards, etc. The purpose is professional

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development, not appraisal. *A person's decision not to carry out a developmental activity or achieve a goal should not impact his or her performance evaluation. Correct use of an IDP, however, will likely improve an individual's performance and behaviors.*

- A contract for training. An individual should include all training interests on an IDP. However, training is not necessarily guaranteed because it is on an IDP. Training decisions are made in accordance with Coast Guard policy and budgetary considerations.
- A guarantee of promotion to a higher paygrade. An IDP can help prepare a person to become qualified for a higher paygrade, but does not imply a guarantee of promotion.
- A fix for all supervisor-personnel relations problems. The IDP is only one part of the comprehensive efforts of an organization to enhance job satisfaction and cooperative work relationships.

IDP Assembly

The Enlisted IDP (Enclosure (2)) is designed for placement within a 3-ring binder with 10 tabs or dividers. The assembly is as follows:

IDP Tabs

Binder Cover Sheet:

Tab 1:

- Insert:
 - First Unit Reporting Guide provided by TRACEN Cape May
 - Unit's Check-in/Indoc Sheet(s)

Tab 2:

- IDP Counseling Session Worksheet

Tab 3:

- Background Worksheet

Tab 4:

- Chain of Command Worksheet

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- Other Helpful People to Know Worksheet

Tab 5:

- “A” School and Qualification Criteria Worksheet

Tab 6:

- Advancement Checklists

Tab 7:

- Professional Goal-Setting Worksheet
- Personal Goal-Setting Worksheet
- Educational Goal-Setting Worksheet
- Financial Goal-Setting Worksheet

Tab 8:

- Reservist Information Worksheet

Tab 9:

- Resources

Tab 10:

- Insert
 - Qualification Time Lines, Watch Specific Qualifications, Unit Professional Qualifications, Personal Fitness Plan (Form CG-6049), and any other PQS that establishes unit expectations.

Units will find the Coast Guard's standard form application found in CG Forms helpful when filling out IDPs. However, units may choose to use the Microsoft Word/Excel merge application that is available on the ULDP web-site at <http://learning.uscg.mil/uldp> which is designed to reduce the amount of data entry.

The Process

As the first-termer progresses through the unit check-in and indoctrination interviews, the IDP shall be introduced and discussed by the designated point of contact (i.e. indoctrination CPO, Command Chief, etc.) with the first-termer. As topics are discussed, notes shall be annotated in the member's IDP. *Specify to the first-termer which sections they are to fill out.*

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The supervisor is to have their first formal IDP review and counseling session no later than 30 days from the first-termer's arrival. Written documentation of the session is to be made in Tab 2, the Counseling Session Worksheet, and in TMT.

The IDP process is voluntary but highly recommended for all other enlisted personnel. Follow your command's procedures for IDPs. Use this IDP guide and form to begin the process.

*Step One:
Assess your
competencies and
seek out resources
and support
services*

Step One: Assess your competencies. There are different ways to assess your personality, interests, knowledge, skills, and abilities. For first-termers, much of this will be done with your supervisor. For experienced members, the Coast Guard has support personnel in place to assist with your assessment. These support personnel can provide information on available professional development, educational, and training resources and other related services. They can also direct you to learning activities that may include formal training, a developmental assignment, on the job training, books to read, etc. They can even work with you to link the appropriate developmental activity to the competency and goal.

*Conducting a
self-assessment*

Yourself: To conduct a self-assessment, start by listing your knowledge, skills, and abilities. You can determine what they are by reviewing current and prior job performance and experience, training, education, and developmental activities to identify the knowledge, skills, and abilities you have. This background review provides concrete information regarding current abilities, strengths, and skills. Specifically, review your records in Direct Access, CG Central (My Workspace: Career Management: Enlisted), TMT, and local Training Records; performance evaluations (found in Direct Access); and any information about significant past training and other developmental activities.

ESO services

Education Services Officer (ESO): Full-time ESOs are located at every Integrated Support Command (ISC), Sector, Training Center, and various other units. All units have an individual who serves as a part-time ESO. An ESO can provide information on various educational opportunities. For example, an ESO can assist with college enrollment, counsel you on non-traditional education programs, guide you in completing a Tuition Assistance form, help in locating scholarships or loans, assist in enrolling in college video and audio courses, and administer or arrange for the administration of all DANTES sponsored examinations.

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CDA services

Career Development Advisor (CDA): Your CDA can assist you with information on leadership and professional development programs, advise you about education benefits, and counsel you on career options such as advancement, the transition from enlisted to officer status, or joining the Reserve. A CDA can also assist you with a variety of interest inventories including the Strong Interest and Confidence Skills Inventory (occupational, basic interest, personal style, etc.), Career Assessment Inventory (career decisions involving college, etc.), etc., which are all available through DANTES. CDAs can assist you with developing an IDP.

Coast Guard Institute services

The Coast Guard Institute: The Institute can conduct an Educational Assessment, which determines how your academic experience can be transferred to a college degree program.

CG Transition/ Relocation Manager

Transition/Relocation Manager (TRM): TRMs are located at Integrated Support Commands, TRACEN Cape May, and the Headquarters Support Command. TRMs can assist you in identifying your individual attributes, planning an effective and workable career strategy, and providing you feedback on career issues, options, and barriers. TRMs have a variety of career tools and some are certified career coaches. In addition, some TRMs can assist you with the Myers-Briggs Type Indicator, etc.

Step Two: Write down your goals

Step Two: Write down your goals. The act of writing goals on paper is one of the most important aspects of an IDP. It encourages you to think about what you want to achieve and list the steps you will need to take to accomplish your goal(s). The Goal Setting section of the IDP (Tab 7) is divided into professional, personal, educational, and financial goals. For each of these goal areas, think about what you want to do in the short-term (3 months to a year) and long-term (1 to 5 plus years). Present what you want to do in the form of goals. A goal is a statement of a desired outcome or accomplishment that is specific, observable, and realistic. For first-termers, the supervisor will assist in defining your professional, personal, educational, and financial goals. Additional assistance is available from those personnel listed in the Other Helpful People to Know Worksheet (Tab 4).

Questions to ask yourself

Ask yourself:

- What do I want to accomplish in the next 3 to 12 months?
- What do I want to accomplish by this time next year?
- What do I want to accomplish by the end of the second year?

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- What do I want to accomplish by the end of the _____ year?
- What steps do I need to take to accomplish each goal?
- What barriers or obstacles might prevent me from accomplishing my goals (e.g., time, money, other commitments, etc.)?
- What can I do to overcome these barriers or obstacles?
- What resources are available to help me?

Refer to the Advancement Checklists (Tab 6). Determine what your advancement options are internal to the Coast Guard and what you need to accomplish. Next, write your goals on the worksheets (Tab 7) and list the steps of how you plan to accomplish them. This will enable a CDA, ESO, or supervisor to better understand your individual needs, goals, and objectives.

Step Three: Set up meeting

Step Three: Set up a meeting with your supervisor. A first-termers supervisor will automatically set up this meeting for the member.

Step Four: The meeting

Step Four: The Supervisor/Member Meeting: The objectives of the supervisor and member meeting are for the supervisor to provide feedback to the member and for the supervisor and member to obtain mutual commitment and align expectations on the IDP.

Supervisor's responsibilities

Supervisor's responsibilities: Before meeting with the member, a supervisor should:

- Determine if there are position-related knowledge, skills, and abilities that need to be enhanced to improve performance in the member's present position
- Review the Advancement Checklists (Tab 6) applicable to the member
- Be aware of training resources available
- Be aware of organizational trends and/or planned changes that will require the member to develop new skills or enhance current skills

Member's responsibilities

Member's responsibilities: The member should provide the supervisor with a draft copy of the goal-setting worksheets (Tab 7) prior to the meeting and should also bring a copy to the meeting.

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Actions to be accomplished

Actions to be accomplished: Together the supervisor and member discuss:

- Member's goals, interests, and career aspirations
- Organization's needs, expectations, and plans
- Advancement and/or developmental objectives for member on which both agree, activities that will achieve the objectives, schedule for activities (considering member's responsibilities), check-back points, and possible reasons for revising or updating the IDP.

Step Five: Finalize & sign counseling worksheet

Step Five: After the member/supervisor meeting, the member prepares the final IDP. Both the supervisor and the member sign the Counseling Session Worksheet (Tab 2) indicating support of the plan. The member keeps the original IDP.

Step Six: Implement

Step Six: Implement your plan.

Step Seven: Follow-up

Step Seven: Continuously update your IDP and follow-up with your supervisor.

Step Eight: Next meeting

Step Eight: Schedule the next counseling session approximately six months out.